Enterprise Content Management Workgroup
Minutes
May 31, 2017
1:00 PM
Cogswell, Room 151

Attendees:

George Parisot, DLI	Marlo Conrady, SITSD
Elle Arredondo, OPI	Chris Bernet, DLI
Larry Krause, DOC	Kim Warren, DLI
Teri Juneau, DOC	Judy Kelly, DLI
Carol Schopfer, DOR	Mike Bousliman, MDT
Patrick Miller, DOR	Steve Evans, Lexmark
Audrey Hinman, SITSD	Jeff Matthews, Lexmark

Staff Present: Wendy Jackson

✆ **Real-time Communication:** Frank Brewer, Robert Haufman, Sue Leferink, Christie McDowell, Erin Mook, Kal Njos, Heather Hardman, Miranda Needham

Welcome and Introductions
Elle Arredondo welcomed everyone to the Enterprise Content Management (ECM) workgroup kickoff meeting. All attendees were introduced.

Minutes
Motion: Judy Kelly made a motion to approve the March 29, 2017 minutes. Chris Bernet seconded the motion. Motion carried.

Business
Members List
Ms. Arredondo stated that it would be beneficial for agencies participating in the ECM workgroup to have a delegate and an alternate. Ms. Arredondo suggested meeting attendees bring information regarding their agency's delegate and alternate for this workgroup to the July 27, 2017 meeting.

Larry Krause mentioned that Teri Juneau will be the delegate for the Department of Commerce (DOC). Mr. Krause will serve as the alternate for DOC. Patrick Miller noted he will be the delegate for the Department of Revenue (DOR). Carol Schopfer will serve as DOR's alternate. Chris Bernet will serve as delegate for the Department of Labor (DLI) with Kim Warren acting as DLI's alternate. The Application Technology Services Bureau (ATSB) will provide support to this workgroup with staff attendance to include one or more of the following; Audrey Hinman, Karin Ohlin, or Marlo Conrady.
Agencies with delegate and alternate member information for the workgroup should contact Ms. Arredondo at EArredondo@mt.gov or Wendy Jackson at wjackson@mt.gov.

Action Item: CIO Support will add contact information for Steve Evans and Jeff Matthews to the ECM member list.
Action Item: CIO Support staff will add the names of workgroup delegates and alternates to the ECM Workgroup Members list.

Agency ECM Project Updates
The workgroup reviewed current and long-term ECM projects. Ms. Arredondo noted the Office of Public Instruction (OPI) is developing an Accounts Payable (AP) solution with a tentative go live date of June 2, 2017. OPI will explore accounts receivable and/or school finance audit process solution as their next ECM implementation.
Chris Bernet reviewed current ECM projects for the department of Labor and Industry (DLI). Deployment of training for the Employment Relations Division (ERD) solution for the Independent Contractor Registration

System will begin the week of June 5, 2017. The projected go live date for this project is August through September 2017. The implementation of this solution will be split a series of smaller roll-outs to encompass all the applications within the system. The ERD Solution offers 4 applications utilized by ERD and the Human Rights Bureau Division. This solution will migrate all applications with documents in FileNet and allow for integration with workflows. The unique aspect of the ERD solution is the integration component, created by a DLI Internal Developer, allows staff to complete most their work from within these applications including indexing and editing. Mr. Bernet stated the Business Standards Division (BSD) solution is currently slated to go live in January 2018. A consultant will be on-site within three weeks to conduct initial design reviews. BSD is considering a large process change to coincide with the implementation of the ECM solution which will encompass the document scanning process. This change would serve to streamline the document ingestion and dissemination process. Mr. Bernet informed the workgroup that the Un-Employment Insurance Division (UID) is rolling out the Professional Document Composition (PDC) solution. UID utilizes 1,200 document types in their system. These documents lack consistency in format and verbiage. UID will utilize PDC to rebuild these documents and incorporate DLI branding. The PDC solution allows developers to lock documents for editing to limits user altercation of letters. This solution also allows for the standardization of letters and for changes to be made to several documents concurrently. ATSB is assisting DLI with infrastructure building for this solution Mr. Bernet commented DLI is looking to step away from Professional Services and utilize DLI internal developers to build a Personal Action Form (PAF) in ECM for internal Human Resources (HR) usage.

Q: Mr. Krause: Is DLI using professional services to develop ECM solutions?

A: Ms. Hinman: DLI is utilizing professional services from Lexmark to establish new ECM Solutions due to the complex nature of the business needs. These services require complicated migrations, enhancements, and applications, which increase the level of difficulty for building and implementing solutions.

Judy Kelly stated that DLI has used the professional services, procured from Lexmark, to build heavily integrated solutions and to provide training opportunities to DLI staff.

Action Item: Mr. Bernet will provide an update on the ERD training rollout to the ECM workgroup once training is complete.

Audrey Hinman reviewed recent State Information Technology Services Division (SITSD) activities regarding ECM support. SITSD will initiate phase two of the ITPR process and move the ITPR workflow process into production on June 5, 2017. ITPR offers SITSD an Internal Technical review board process. The CIO Brief Process will go live on June 5, 2017. Travel requests will move into production by June 12, 2017. Purchase order and invoice processes is scheduled to move to production by June 26, 2017. The deadline for live production regarding these processes is June 30, 2017. Following this deadline, work will begin on the CIO Approval process, using DocuSign to sign contracts within the state. Work will also begin on the SITSD internal Decision Brief process following the roll-out of the CIO Approval project. All SITSD services will be available to agencies located at SITSDServices@mt.gov.

Terri Juneau stated that the Department of Commerce is seeking information regarding utilizing an ECM solution for Accounts Payable. Ms. Juno requested input from the workgroup regarding design.

Action Item: Ms. Arredondo will schedule a meeting with Ms. Juno to provide insight regarding DOC design.

Patrick Miller stated that the Department of Revenue (DOR) has completed the Office of Dispute Resolution (ODR) solution. DOR is making final revisions to this solution to reduce the number of queues and apply enhancements. DOR is considering the use of iScripts to provide a warning notice to users regarding impending ODR deadlines. DOR is in the process of adopting the Travel Accounts Payable (AP) process from the Department of Justice (DOJ). The feasibility of this adoption will be determined in July, 2017. DOR is also exploring an ECM solution for HR processes. Mr. Miller will provide a demo for HR solution to showcase the ECM solution and seek feedback. Mr. Miller stated Montana Interactive (MI) has developed a content management system (CMS) that offers a better solution for the electronic form (e-Form). This solution allows for the development of e-Forms without requiring development experience. DOR is currently in the process of User Acceptance Testing (UAT) to ensure that all solution components work well together. The e-Form solution is already being utilized in the ODR production process and property assessment form. DOR is exploring the

use of e-Forms for tax forms and internal forms. Mr. Miller stated that DOR is looking to build a notification, with custom property values, into their email without using an iScript to avoid the necessity of logging into Perceptive.

Action Item: Mr. Miller will meet with Ms. Kelly to review DOR's Payroll Action Report and to discuss how this solution might be helpful to DLI.
Action Item: Ms. Kelly will collaborate with Mr. Miller regarding the development of an email notification without using iScripts
Action Item: Mr. Miller will give an update regarding the email notification without iScript solution at the July 26, 2017 ECM meeting.
Action Item: CIO Support will add the Email Notification without iScript Solution update to the July 26, 2017 ECM meeting agenda.

Ms. Conrady reviewed SITSD consultations with the Department of Public Health and Human Services (DPHHS) regarding their new hire process where onboarding paperwork is communicated via fax. DPHHS is considering several different solutions and will inform SITSD when the have reached a decision. SITSD is assisting DPHHS in the migration of all content from their Document Management System (DMS) onto ECM.
Ms. Ohlin stated SITSD is developing an ECM solution for the Montana Family Safety Information System (MFSIS) within DPHHS. The projected completion date for this solution is October, 2017.
Ms. Conrady stated that SITSD has met with the Secretary of State (SOS) Financial Department to explore the possibility of using ECM for SOS financial documents.

Q: Mr. Krause: Is ECM being used in an HR capacity anywhere in the state?
A: Jeff Matthews: An HR needs assessment was conducted and a detailed report was provided to DOJ. The department then used internal developers to build an ECM solution based on this assessment. Lexmark assisted in this process by providing advisory support from their HR expert.

Action Item: Mr. Matthews will provide Mr. Krause a copy of the needs assessment report generated for DOJ.

Ms. Arredondo informed the workgroup that the Office of Public Instruction (OPI) plans to go live with their AP solution on June 5, 2017. This solution utilizes a Lexmark designed e-Form that interfaces with SABHRS.
Ms. Hinman stated that the AP module was used to build the OPI AP solution. Some customization was required. This module is located on the infrastructure and can be implemented by other agencies. Ms. Hinman stated that agencies looking to implement this module should consult with Lexmark representatives to ensure agency's specific needs are addressed.

Action Item: Ms. Arredondo will provide a demo of OPI's AP solution at the July 26, 2017 ECM meeting.

Agency Collaboration
Ms. Arredondo advised the workgroup that members interested in pursuing, discussing, or demoing new ECM solutions are encouraged to voice these interests to the group to facilitate collaboration. Individuals interested in having a demo presented to the workgroup may contact Ms. Arredondo at EArredondo@mt.gov.

Mr. Matthews commented that a central repository for State of Montana ECM design documents and scripts would greatly aid inter-agency collaboration.
Ms. Ohlin stated that scripts posted for sharing must first be cleaned to remove sensitive data.
Ms. Kelly suggested creation of a subcommittee would be helpful to aid in the establishment of a repository site for script sharing.
Mr. Bernet stated that a descriptive paragraph summarizing script functionality would be a useful addition to the script repository.
Mr. Matthews suggested that agencies develop a prepopulated design document template that can be customized to fit different agency needs. This would greatly reduce design time and allow for streamlining of development efforts.

Action Item: CIO Support Staff will add a script site sharing process discussion to the July 26, 2017 ECM Meeting agenda.
Action Item: Ms. Arredondo will open a service desk ticket to have the ECM SharePoint site created.
Action Item: CIO Support Staff will post the ECM SharePoint site link to the ECM website.

Future Meeting Times and Dates / Reoccurring
The workgroup agreed to hold bi-monthly ECM workgroup meetings, at the end of the second month, for a length of two hours.
If you have questions or concerns that arise prior to the next ECM meeting, contact Ms. Arredondo at EArredondo@mt.gov or Ms. Jackson at wjackson@mt.gov.

Lexmark
Mr. Matthews recommended Best Practices for the workgroup should entail sharing resources and tools. To further achieve mutual success regarding ECM solutions, agencies should communicate and collaborate. Agency demos showcasing ECM solutions during workgroup meetings serve to assist members in the development and implementation of ECM. Mr. Matthews suggested the State of Montana should consider developing a program, in conjunction with Carroll College IT Department, to hire college students and train them on e-Forms and scripting. This would result in cost savings to the state by reducing development costs, incurred by having Lexmark perform ECM solution development.

Mr. Evans discussed Best Practices regarding sandbox environments, which are used to test for future solutions. Usage of these sandboxes should be dictated by SITSD Best Practices. Lexmark customers have found offering management access and privileges of the sandbox to others within the environment is helpful. Utilizing available migration tools and establishing a back-up system have been identified as Best Practices for sandboxes.

Q: Ms. Kelly: Can we post a tool belt on our SharePoint site?
A: Mr. Evans: Yes, if it is located being a firewall. The tool belt was developed specifically for use by the State of Montana and is not a Lexmark product. As such, the tool belt will not be supported by Lexmark customer service.

Ms. Kelly suggested the creation of a "How to Get Started in ECM" guidelines for sharing scripts, naming conventions, creating forms, and posting to the ECM SharePoint site.

Ms. Ohlin stated that ECM users can access the Lexmark Support Page and attached training links. Individuals experiencing difficulties accessing this site should open a POB ticket.

Action Item: CIO Support Staff will email the Lexmark Support Page link to the ECM workgroup.

Mr. Evans reviewed changes related to the 7.2 version. The full text searching capability from previous versions will not be available in the 7.2 version. This feature has been replaced with an enterprise search tool that will be available within the experienced client or html web client. In addition, the experienced client was updated. The client continues to expand to include a variety of workflows and search capabilities. Integration server calls were also updated and expanded. The experience application is a web based client that does not contain Java dependencies. Users with Internet Explorer version 9 or above are able to fully utilize the experience application. The Simple Object Access Protocol (SOAP) message agent based product stream was discontinued and replaced with the integration server engine.
Ms. Ohlin commented the State of Montana's version of the experience application is severely limited in its function.
Mr. Evans stated that the experience application currently utilized by the State of Montana is approximately 20% complete, as opposed to the updated version which is 80% complete. The updated experience application is completely skinable, so diverse types of applications can be embedded. Users can also re-skin the application to maintain consistency with State of Montana hosted applications.

Action Item: Mr. Evans will conduct research to discover if any reporting changes are included in version 7.2.

Mr. Evans advised the workgroup DocuSign is currently the best solution available to state users for obtaining electronic document signatures. The Lexmark products Sign Doc and Assure Sign are still in production and may experience further delays.

Standing Reports
State Information Technology Services Division (SITSD) FileNet Migration to ECM Environment update
Ms. Hinman gave an update regarding SITSD ECM Migration activities. An issue was discovered, concerning the FCC module, which is primarily utilized by the Department of Natural Resources and Conservation (DNRC) water rights. SITSD collaborated with Lexmark to resolve this issue and identified an alternate product to perform the conversion, previously completed by the FCC module. A contracts amendment for Enterprise Search and multi-field values was completed. This amendment enables users to display multi-value fields in FileNet. SITSD is waiting on a Statement of Work (SOW) from Lexmark. There are five agencies with projects on hold, pending the SOW from Lexmark. Ms. Hinman stated that Interact for Outlook is a tool bar button which allows users to drag and drop documents email attachments directly in to the Perceptive environment. This license is available for all state users and entails a simple installation process.

Action Item: Ms. Hinman will demo Interact for Outlook during the July 26, 2017 ECM Workgroup meeting.

Future Agenda Items

Next Meeting
July 26, 2017
1:00 PM to 3:00 PM
Cogswell, Room 151

Adjournment
The meeting was adjourned at 2:43 PM.